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ABSTRACT

This report is one of a series presenting the results of studies of NDEA Title XI and Arts and Humanities Foundation Institute programs and selected institute-associated activities conducted in 1966. During that year, five economics institutes were held. The 175 participants in these institutes were involved in a variety of programs, including one on labor management problems, one on economic theory, and another involving the preparation of economic education material for the DEEP Program. All of the institutes used a combination of lectures, guest speakers, and study groups to present a theoretical framework for the analysis of economic problems. The report analyzes the institutes in terms of: a) needs and objectives; b) personnel; c) content; d) balance between content and educational techniques; e) organization; f) follow-up; g) participants; h) physical arrangements and facilities; i) observers' and participants' evaluation; and, j) conclusions and recommendations. Among other things, this last section notes the importance of the skill and personality of the director as a factor in the success or failure of an institute. They also point out that the institute objectives should be clearly defined and expressed; the participants should be fairly homogeneous; and, that attention be given to techniques to help the teacher transfer economic understandings to the classroom. (Author/JLB)

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REPORT ON
THE 1966 NDEA ADVANCED STUDY INSTITUTE
IN ECONOMICS

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CoNpass

1966

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FOREWARD

This report is one of a series presenting the results of studies of NDEA Title XI and Arts and Humanities Foundation institute programs and selected institute-associated activities conducted in 1966 by the Consortium of Professional Associations for the Study of Special Teacher Improvement Programs (CONPASS) for the U.S. Office of Education under Contract No. OEC2-6-001005-1005 and four subcontracts.

The Consortium was formed in May 1966 by the five associations which assessed the 1965 Title XI institute program – the American Historical Association, the Association of American Geographers, the Department of Audiovisual Instruction (NEA), the International Reading Association, and the Modern Language Association of America. Invitations to membership were subsequently extended to, and accepted by, the American Economic Association, the American Industrial Arts Association, and the American Political Science Association. Four members at large provide liaison with the arts and humanities, psychological tests and measurement, educational psychology, and teacher education specialists.

The objectives of CONPASS are to: provide a coordinated assessment of the effectiveness and impacts of institutes and other types of special teacher training programs; propose means of improving such programs; and provide a medium for dialogue among the professional associations and leading scholars of the several subject content disciplines and fields represented on its Board. These reports constitute a portion of the program developed to fulfill those objectives. It is hoped that they will prove useful to educators in general as well as to directors and prospective directors of institutes, officers of the U.S. Office of Education, and legislators and administrative officials of the Federal and States' Governments in their joint efforts to improve the quality of American education at all levels.

We take this opportunity to thank the consultants who conducted the studies and authored these reports for their diligent and conscientious performance of complex and exacting assignments.

Kenneth W. Mildenberger, Chairman William H. Wake, Director

PREFACE

Title XI of the National Defense Education Act was extended in November 1965 "to include teachers and supervisors of teachers of economics, civics and industrial arts." Early in 1966 the Office of Education invited eleven universities to submit applications for economics institutes during the summer of 1966. Five of these applications were approved and institutes were held at Rutgers University, Carnegie Institute of Technology, Kansas State University, the University of Michigan, and the State University of Iowa.

The 175 participants in the institutes were involved in a variety of programs. The 37 teachers at Rutgers concentrated on labor-management problems, while 29 business education instructors at Kansas State were enrolled in two intermediate economic theory courses. The Iowa program was originally aimed at 40 teachers of the social problems course, and the University of Michigan hoped to reach 40 supervisors and directors of economic education programs. Twenty-four of the 27 participants at Carnegie Tech were involved in the preparation of economic education material for the DEEP Program (Developmental Economic Education Program) sponsored by the Joint Council on Economic Education.

All of the institutes, regardless of their program, used a combination of lectures, guest speakers and study groups to present a theoretical framework for the analysis of economic problems. In each case, part of the time was allocated to educational techniques and materials.

THE OBSERVATION TEAM

At the request of the U.S. Office of Education, the Association of American Geographers established a Consortium composed of representatives of the disciplines involved in the National Defense Education Act. The Consortium was given the task of evaluating the various institute programs. Professor Robert L. Darcy of Ohio University and Professor Jim E. Reese of the University of Oklahoma were asked to visit the 1966 Summer Institutes and prepare a report for the Consortium. Professor Darcy visited Rutgers and Carnegie Tech, while Professor Reese observed Iowa, Michigan, and Kansas State. In each case, the observer was given complete cooperation and was treated with every possible consideration. Lectures and class sessions were audited and materials prepared by the participants were examined. All of the participants were asked to fill out a short questionnaire prepared and distributed by the Office of Education.

The two observers spent two days in a writing conference late in August and met again for one day with a curriculum specialist, Dr. Philmore B. Wass, Professor of Education, University of Connecticut, late in September. Because all of the institute directors were experienced in the field of economic education and were selected because of this background, an evaluation in the usual sense was unnecessary. Therefore, the visitors looked for hints on procedures and methods which might be useful to future directors. Notes were also made on the ideas or activities which were not successful.

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THE 1966 NDEA ADVANCED STUDY
INSTITUTES IN ECONOMICS

PART I
NEEDS AND OBJECTIVES

In economics, as in all disciplines, there is now a need for more and better instructors at both the secondary and elementary levels. For many years, however, the shortage of properly trained economics teachers was not serious because few schools included economics courses in their curriculum. This situation began to change shortly after World War II and by the mid 1950's there was a growing demand for more courses in economics at the secondary level and a gradual realization of a need for better handling of the economic content in related social studies programs. Today, almost all major school systems offer an economics course as a high school elective and an ever-increasing number are stressing economics throughout the entire curriculum K through 12. Similar attention is being given to the economic content of other courses.

Unfortunately, this growing emphasis on economics and economic problems finds the economics training of the secondary and elementary teachers woefully inadequate. Unlike English and history, where most of the instructors have considerable preparation in their subject area, most economic courses are taught by people with little or no formal training in the discipline. This lack of preparation has been documented many times and needs no further elaboration here. The problem is compounded by the fact that courses in such areas as social problems, civics, and even history, now stress the economic aspects of the material under consideration. Needless to say, the level of interpretation and analysis in these subjects also leaves much to be desired.

It must also be recognized that many economic problems are highly controversial and that any discussion of these issues may evoke an emotional rather than a rational reaction on the part of parents and of the general public. Contending economic interest groups have been known to complain bitterly about the brand of economics taught by teachers and to teachers. Thus at any moment, the economics instructor at any level or in any teaching situation may be subject to intense pressures from either the extreme right or the extreme left. In most institutions the balance of the program prevents such criticism, but in one case, a particular economic group felt that it was not adequately represented on the program. The institutes as a whole made little or no effort to prepare the participants for such attacks or to teach them how to defend themselves as objective and impartial.

Finally, any economic education program must take into account the existence of the Joint Council on Economic Education and its approximately 50 State and Local Councils. The Joint Council on Economic Education is the only organization of its kind officially recognized by the American Economic Association and the major economic research organizations.

Under the terms of its charter, the Joint Council must have on its board of trustees professional educators, and must include representatives of all the major economic interests such as agriculture, labor, business, finance, banking, and government.

Therefore, one of the major tasks in the field of economic education is to work out a division of labor between the NDEA Institutes and the activities of the Joint Council and its affiliates. With proper planning and coordination, the Office of Education and the Joint Council could strengthen and supplement each other, but without such coordination there is likely to be duplication and wasted effort.

PART II
INSTITUTE PERSONNEL

At first glance it might seem unnecessary to stress the importance of staff in an educational endeavor, but in some instances problems have detracted from the success of the institute.

The Director

In our opinion, the importance of the director cannot be overemphasized. It is the director that gives the time, the spirit and, to a large extent, determines the success or failure of an institute. Indeed, the 1966 experience indicates that almost any kind of type of program will succeed when properly directed. In one 1966 institute some of the staff deficiencies were overcome by the personality and drive of the director. In another instance, the director was able to compensate for a relatively narrow program by personally linking the program to the wider economic issues of the day.

The high rating received by all of the 1966 institutes is undoubtedly due in large part to the fact that all five directors had a broad background of experience in economic education, activities and programs. In one or two instances, however, the institute suffered from the fact that the director was unable to devote full time to the institute activities because he had other responsibilities. In three of the five institutes the director was a member of the instructional staff and carried a major part of the instructional load. In each instance the participants considered the director an outstanding instructor and many participants expressed a wish that the director could undertake an even larger share of the instruction.

Instructors

On the whole the participants gave the instructional staff a high rating but to the observers the quality and performance of the instructional staff seemed rather uneven. In one or two instances, instructional problems detracted from the success of the institute. In other instances, inexperience, failure to make adequate preparation or the lack of real interest in the welfare of the participants hampered the instructional performance. In

some cases professionally qualified instructors had difficulty adjusting their material and presentation to the level and needs of the participants.

The typical instructional pattern involved at least two economists and one specialist in education or curriculum development. Considerable use was made of spot or part-time instructors who dealt with specific topics or problems, but the extent of this use varied greatly from place to place. In some instances the permanent or full-time instructional staff attended all meetings, but in other programs, the staff attended only those sessions for which they were personally responsible.

Some directors indicated that it was difficult to recruit full-time staff economists because the work load and the pay were out of line when compared to the pay and work load for summer teaching or consulting.

Clerical and Administrative Staff

All of the institutes had a full-time secretary and several had full-time assistant directors. The number of clerical and administrative assistants, usually graduate students, varied considerably. In one or two instances, the non-instructional staff was so small that instructors and even the director himself were involved in manual chores and leg work.

Guest Speakers and Visiting Lecturers

Here again, the performance seemed highly uneven. Judging from the reaction of the participants, some of these speakers gave truly outstanding and inspiring presentations while in other cases, the participants felt that the lecture was a waste of time. The unsuccessful performances seemed to be due to a variety of causes ranging from a lack of preparation to a failure to understand the needs and background of the participants. In most instances, the visiting speakers were not completely briefed on their role and on the material already presented. As a result there was some overlap and duplication. In a few instances, the speakers apparently failed to understand their role and presented lectures that were not particularly pertinent to the content of the program.

Since these institutes were operating during the 1966 airline strike some of the scheduled lecturers did not appear because they were unable to secure transportation. In one instance a very important visiting lecturer was forced to cancel a tentative agreement to appear because of conflicts elsewhere.

PART III
CONTENT

Economists have not as yet been able to settle upon a generally accepted "content" for an introductory or elementary course in economics. This diversity of opinion was reflected in the institute programs. Some instructors advocate the problems approach in the belief that an analysis

of specific problems will ultimately involve all the major principles or laws. To some extent Rutgers was an example of this approach. On the other hand, the Kansas State program was based on the assumption that business education teachers needed an intermediate course in micro and macro economic theory. The other three institutes were somewhere between these two poles. At Iowa, for example, three weeks were devoted to principles and three weeks to problems.

Another issue is coverage. Should the limited time available to the institute be used to probe in depth, or should the goal be a broad, general coverage? In this regard most of the institutes were compromises but the pattern, if any, was in the direction of breadth rather than depth of coverage. It might also be noted that in some instances the frequent use of subject matter specialists tended to disrupt the continuity of presentation.

In general the participants felt that the content was satisfactory in all of the institutes and the observers have come to believe that there is no one best way to structure an institute. It is interesting to note that the participants did not seem to be disturbed by the length of the institutes which ranged from six to eight weeks.

In some instances participants expressed a desire for more exposure to different points of view or schools of thought. In this connection the question of balance arises again. Is it more desirable to use the academic approach, with emphasis on objective analysis, or should the participants be exposed to the more emotional atmosphere of debate and controversy?

Finally, in at least one instance, the participants were greatly concerned over their grades and at times seemed to forget the real objective of the institute.

PART IV
TRANSFER

As indicated earlier, all of the institutes made a definite attempt to provide a means for the transfer of the content material to the classroom situation. In each case there was an education instructor or instructors and a portion of the time was set aside for the preparation of classroom materials. In one instance the participants were asked to outline the procedures and methods they planned to use in their classes. In most cases, however, participants prepared definite units to show how they would present content material to their own students. These materials were available to the other participants and in at least one instance the individual materials were collected, reproduced and each participant given a copy of all the units.

The education instructor usually supervised this work, but in one institute the individual delivered his unit before the group and was criticized by his colleagues as well as his content instructors. In another instance, the participant's unit had to be approved by his content instructor.

There seemed to be no agreement among the participants as to the exact balance between content material and time devoted to educational

techniques. As a rough generalization, the more experienced teacher preferred more content material and less educational material, while the younger teacher with less experience wanted guidance and help in preparation of teaching units. A few participants violently objected to the preparation of units, and some said they thought more examinations and testing would be preferable. One of the directors pointed out, however, that many of the units prepared by the older, experienced teachers were quite inadequate from a content point of view.

There seemed to be a general feeling among the participants that much of the education work was a repetition of the education courses which the participants had already taken. Most of them expressed a desire for more instruction in the use of new teaching devices and techniques. Indeed, one of the grave weaknesses of the 1966 programs was a general failure to make the best use of films and visual aids. In most instances little attention was paid to the development of new teaching techniques or devices. Their failures may have been due to the late start of the institutes and to the fact that the directors did not have time to accumulate the necessary materials.

The use of field trips varied greatly. In one case the director felt that field trips detracted from the program. Others considered them an integral part of the instruction. The reaction of the participants was mixed.

The Master Teacher Concept

In at least three instances the observer was asked by the participants if it would not be possible to have more demonstration of teaching techniques. The phrase "master teacher" was used over and over. The feeling was that the participants would like to see some outstanding person perform in the classroom or show them the techniques, material and procedures to use on a particular topic. In this connection one of the directors pointed out that a teaching performance depended upon the personality of the instructor and that a teaching technique used by one individual might be quite unsuccessful for another.

One institute did make an attempt to use the "master teacher." In this instance the participants were divided into groups under an outstanding high school teacher who was employed as a staff member for the express purpose of showing how the subject matter could be taught in the classroom. One serious criticism arose from the fact that the participants rather resented being instructed by their peers. The reception of this device would undoubtedly have been much better if the "master teacher" had been a member of a college faculty.

PART V
ORGANIZATION

In many ways the organization of the institutes was a reflection of the director's personality. Thus on one hand an institute might be highly structured and tightly organized, while at the other extreme a sort of free

wheeling, highly flexible program would be encountered. In all instances, however, there were certain issues or problems which had to be solved one way or the other.

Finance

Several of the institute directors found themselves in financial difficulty from the outset. In a few instances the pay of the participants was delayed for several days. In other cases unexpected expenses arose which could not be met from institute funds. Several of the directors pointed out that in the future directors should carefully examine all of the financial aspects of their program. One of the major difficulties stemmed from conflicts between university regulations and Office of Education procedures as set forth in the contract governing the grant. It would almost appear that some of the university financial officials failed to read the contract or else did not take it seriously at the time of the signing.

Committee Structure

All of the institutes used some method of self-evaluation. In some instances, the Evaluation Committee was composed entirely of participants and in other cases the committee was a mixture of staff and participants. All of the participants in all institutes were required to fill out the questionnaire designed by the Office of Education and the Bureau of the Budget. In addition, some of the institutes used questionnaires of their own design.

In one institute, participant committees were set up to handle such things as recreation, materials, and other housekeeping chores. In this particular institute a Steering Committee acted as a liaison between the participants and the director. Complaints from the participants came to the Steering Committee and the members discussed the situation with the director. Suggestion and question boxes were also available. It might be noted that in this case the program and procedures were changed on several occasions. To use a specific example, two lectures on agriculture were added at the request of the participants.

The structure of some of the other institutes was less formal but all tried to secure feed-back by one device or another.

Study Groups

All of the institutes made some provision for dividing the participants into smaller study groups. In one instance, the institute was divided into four study groups with a staff member or "den mother" in charge of each group. These groups met regularly and were used for a variety of purposes. When time permitted, visiting lecturers or speakers attended these small group meetings and took part in the discussions.

In other institutes the composition of the groups depended upon the activity in question. On one occasion the participants might be divided on

the basis of their teaching experience; again the division might be based upon the subject matter taught or on the basis of the amount of training in economics.

Some participants seemed to feel that more time should be spent in small group sessions where the individual had a greater chance to participate.

Division of Time

The institutes varied greatly in the amount of time allocated to various activities and also in the rigidity of the allocation. In one instance the program could be changed very quickly and easily by a simple announcement from the director. In another institute the allocation was more formal and rarely changed.

There was no unanimity of opinion among the participants on the allocation of time. In the same institute some might feel that more free time was needed for study while others would say they had all the free time needed. In some of the institutes there seemed to be a feeling of pressure toward the end of the institute. Here the participants felt that the need to complete units or projects interfered to some extent with their ability to obtain maximum benefits from visiting lecturers or even the regular class work.

PART VI
FOLLOW-UP

It goes without saying that the success of any institute depends upon its effect upon the teaching practices of the participants. Since the institute grants did not provide funds for follow-up activities, this aspect of the program was very weak. In one instance, the director by virtue of his position with an Economic Education Council planned to visit the majority of the participants and to observe them in their classroom situation. Another director was considering the possibility of holding a one-day conference in the fall for the participants in the immediate vicinity. For the most part, however, the director had to depend on faith and hope.

PART VII
PARTICIPANTS

All of the institutes experienced some difficulty in recruiting. Applications were not as numerous as had been anticipated and the quality was not always as high as had been expected. In the four institutes reporting, only 335 applications were completed for the 146 openings. The failure to secure an adequate number of qualified applicants may have been due to the lateness of the announcements and a general lack of publicity. On the other hand, some of the National Science Foundation Institutes in Economics reported the same difficulty even though their announcements were made early.

As a consequence of this situation there was a lack of homogeneity among the participants in all institutes. The institute originally designed for social problems teachers included teachers of history, economics, and some supervisors. As might be expected, they also varied greatly in the amount of training in economics. Both participants and staff agreed that a more homogeneous group would be desirable. In particular the new teachers and those with little preparation in economics felt themselves to be at a disadvantage. The disadvantage may not have been as great as the participants thought, but it was a psychological handicap. As a practical matter, the diversity in training, experience and subject matter made it very difficult for the instructors and students to find a common meeting ground.

In some institutes commuters were a problem. Commuters usually left early to avoid traffic problems and in some cases were not available for evening sessions. There was also doubt as to the amount of time the commuters were able to devote to institute studies after they reached their homes. In one place there was resentment occasioned by the fact that a few of the participants were allowed to commute, while others were not. Although the commuters were granted this permission by the director for valid reasons, the reasons could not always be revealed. In general it seemed that the institutes with little or no commuting were better organized and had a higher morale than those which permitted the practice.

The presence or absence of families also occasioned some difficulty. Participants who left their families at home did not appreciate the fact that other participants elected to bring their families. It was felt that the presence of the family detracted from the participant's work.

In general, however, the participants seemed to appreciate the opportunity to improve themselves and with very few exceptions overall morale was high.

PART VIII
PHYSICAL ARRANGEMENTS AND FACILITIES

The fact that the grants were not made until late in the spring made it difficult for the directors to secure adequate physical facilities. In one instance, the institute was unable to secure an air-conditioned building for classes and living quarters, and, as might be expected, the summer was one of the hottest and muggiest on record. In another instance, the air-conditioning proved rather unreliable. In other instances, make-shift classrooms had to be used. Both observers felt that some of the seating arrangements left much to be desired. There was also some complaint among the participants about housing arrangements for the families of participants. A few indicated concern over the inadequacy of recreational facilities and opportunities.

Both observers felt that there was considerable room for improvement in this area. Whether right or wrong, the participants expect first-class housing, meals, classrooms and air-conditioning.

PART IX
OBSERVERS' EVALUATION

Both observers felt that the five institutes were successful. While all had weak points, it was clear that the overall teaching effectiveness of most of the participants would be improved by their experience. Perhaps the most general criticism of all the institutes would be their failure to produce anything really new or novel either in content or teaching techniques. The presentation of content and educational techniques were both remarkably conventional and at times a bit drab. Certainly more thought and effort needs to be given to the introduction of new, fresh ideas and to the whole concept of innovation.

In four of the five institutes standardized tests developed by the Joint Council on Economic Education in cooperation with the American Economic Association were given on a pre- and post-test basis. Two separate tests were used and the results were as follows: Institute A used two sets of tests. On one test its mean increased from 39.48 to 44.55, and the standard deviation was reduced from 6.00 to 3.69. On the other test, Institute A participants increased their mean from 40.86 to 45.00 and reduced the standard deviation from 5.5 to 4.1.

Institute B on one test increased its mean from 40 to 44 and on the other test participants in Institute B increased their mean from 39 to 44.

Institute C found that 87 percent of the participants showed marked improvement. Only 10 failed to gain. On the post-test 50 percent were in the 95th percentile as compared to 12 percent on the pre-test. Two thirds on the post-test were above the 90th percentile.

Institute D did not use the tests.

Institute E on the one test increased its mean from 40.075 to 44.575 a gain of 4.5. On the pre-test only 2 participants scored 47 or better, but on the post-test 16 reached this level. On the pre-test 15 scored below 40, while on the post-test only 4 were below.

While many economists have some reservations about the use of these particular tests, the increased scores probably do indicate some increase in economic knowledge. Conversations with the participants seem to bear out this observation.

Comment should again be made on the generally high morale of all participants and on the rapport which all of the directors were able to establish with most of the participants.

PART X
PARTICIPANTS' EVALUATION

Tabulation of Participant Responses

Following is a tabulation of responses by the 175 teachers who successfully completed the five NDEA Economics Institutes conducted during

the summer of 1966. The questionnaire was a standardized instrument used by institutes in all the subject areas, not just economics, and was officially approved by the U.S. Office of Education and the Bureau of the Budget.

Participants were asked first of all to evaluate a total of 18 items concerning various aspects of the institutes by checking the appropriate box in a five-level rating scale: "Outstanding," "Good," "Fair," "Marginal," and "Poor." In addition, they were asked to evaluate eight items with respect to the relative time apportioned to the activities during the institutes, indicating whether the allocated time was "Not Enough," "About Right," "Too Much." Finally, the teachers were asked to write their comments and suggestion for five other items.

In order to simplify the tabulation, quantitative values were assigned by the observers to the verbal judgments on the basis of five points for "Outstanding," four points for "Good," three points for "Fair," two points for "Marginal," and one point for "Poor." In addition to the composite rating score (i.e., an average covering all five institutes and weighted according to the number of participants in each institute) the summary also indicates the number of top ratings (5 "Outstanding") and the number of low ratings (2 "Marginal" or 1 "Poor") for each item.

TABLE I-A

Composite Tabulation

(Responses to standard questionnaire by 175 teachers in five institutes)

1. Success of the institutes in imparting knowledge and skills in the area of:	Average Rating	No. of High Ratings	No. of Low Ratings
a. Content in economics	4.3	76	2
b. Identification of economic content essential to effective instruction	4.0	41	5
c. Improved instructional methodology	3.6	20	21
d. Improved instructional media	3.6	24	19
e. Curriculum improvement and/or innovations	3.7	37	14
2. Overall quality of:			
a. Presentations by institute faculty	4.3	86	3
b. Presentations by guest speakers	4.0	46	5
c. Conduct of workshops, laboratories, studios, seminars, etc.	3.6	21	12
d. Choice of field trips	3.1	46	12
e. Conduct of field trips	3.2	49	13

TABLE I-A (Continued)

3. Quality of the facilities and physical arrangements relative to:	Average Rating	No. of High Ratings	No. of Low Ratings
a. Library	4.2	80	6
b. Laboratories, workshops, etc.	3.6	25	25
c. Instructional equipment	3.7	24	13
d. Independent study	3.8	42	14
e. Group study	3.5	20	20
f. Living accommodations	3.3	22	27
g. Recreation	3.5	24	16
4. Effectiveness of the institutes in helping to improve teacher competencies	4.3	65	6

TABLE I-B

Composite Tabulation

(Responses to standard questionnaire by 175 teachers in five institutes)

Evaluation of relative proportion of institute time devoted to:	Not Enough	About Right	Too Much
1. Lectures	15	135 (78%)	24 (14%)
2. Audiovisual presentations	42 (24%)	127 (78%)	5
3. Participation sessions (workshops, seminars, laboratories, etc.)	53 (32%)	104 (62%)	11
4. Field trips	45 (29%)	103 (67%)	5
5. Individual study periods	43 (25%)	123 (72%)	4
6. Free time	43 (25%)	124 (72%)	6
7. Presentations on ecomonic content	42 (25%)	127 (75%)	1
8. Presentations on instructional methodology	63 (37%)	83 (49%)	24 (14%)

Analysis of "High and "Low" Ratings

To note the areas of special strength or success in the institutes, we identified items for which the average rating was 4.0 or higher ("good"

to "outstanding") and also 20 percent or more of the participants gave the highest possible rating ("5" – "outstanding"). These are areas in which the 1966 institutes were especially good in the judgment of the teachers who participated:

1. success in imparting knowledge and skills in economics
2. identification of economic content that is essential to effective teaching
3. quality of presentations by institute faculty
4. quality of presentations by guest speakers
5. quality of library facilities
6. overall effectiveness of the institute in helping to improve teacher competence.

A high 4.3 average, or about one-third of the way between "good" and "outstanding" was given to the success of the institute in imparting content knowledge and skills, and overall effectiveness of the institute in improving competencies of the teachers. (Interestingly, the range of average ratings on this item among the five institutes was only three-tenths of a point, from 4.1 to 4.4). Exceptionally high ratings of 4.5 (the mid-point between "good" and "outstanding") or higher were given to individual institutes for:

1. presentations by institute faculty
2. presentations by guest speakers
3. choice and conduct of field trips
4. quality and physical arrangements of library facilities

In one institute the faculty got a rating of 4.9.

In looking for areas of possible weakness, or trouble spots, we noted the items for which the average combined rating for the five institutes was below 4.0 (that is, below "good") and 10 percent or more of the participants gave the item a low rating – 2 ("marginal") or 1 ("poor"). Future institutes would do well to note these areas and attempt to avoid the problems identified by the 1966 participants. The items that received low ratings were:

1. success in imparting knowledge and skills needed to improve instructional methodology
2. success in imparting knowledge and skills needed to improve instructional media

(More than one-third of the 175 participants felt that not enough time was devoted to presenting information on improved instructional methods and media, and participants felt generally that the institutes were not very successful in helping them to improve instructional methodology and instructional media.) Other items with low ratings were the quality of facilities and physical arrangements for workshop sessions, laboratories, group study and living accommodations. (Lack of effective air-conditioning was a major complaint at some institutes.) The overall rating for living

accommodations was pulled down by one institute where nearly half of the participants judged the accommodations to be "marginal" or "poor."

Viewing the institutes as a group, then, there was no general pattern of serious complaints by participants. No item got an average rating below 3.0 ("fair") in the composite tabulations. On the other hand, low ratings were given to individual institutes on several items, namely:

1. choice and conduct of field trips (not enough and/or not effectively related to economic concepts and principles)

2. physical facilities and arrangements (lack of air-conditioning, inadequate furniture, classrooms and rooms for workshops, etc.)

3. unsatisfactory living accommodations (hot, expensive, etc.)

With respect to the length of the institute, most participants seemed to approve of five or six weeks. (Although the participants were asked to comment on the overall length of the particular institute in which they were enrolled – these varied from five to eight weeks – fewer than half made a clear response. Of these 60 percent felt the time was about right, 20 percent felt the time was too short and 20 percent felt it was too long. This general pattern of response was found in each of the five institutes, regardless of its particular length.) As to the relative proportions of time devoted to various activities in the institute:

1. 37 percent felt that not enough time was given to instructional methodology and media (though 14 percent felt there was too much time in these)

2. 29 percent felt that there wasn't enough time devoted to participant sessions such as seminars, laboratories, etc.

A substantial majority of teachers felt that the relative amount of time devoted to lectures, audiovisual presentations, and presentations of information in the subject area (economics) was about right.

PART XI
CONCLUSIONS AND RECOMMENDATIONS

The following conclusions and recommendations represent the view of the observers and reflect four sets of information and experience: (a) questionnaires and interviews with the 175 teachers who participated in the 1966 institutes; (b) observations made by the observers during personal visitations to the five 1966 institutes; (c) interviews with the institute directors and staff during and after the visitations; (d) number of years of personal participation in economic education programs for teachers in a variety of capacities including directing summer workshops and serving as full-time faculty and as guest lecturers in workshops and institutes.

The opinions expressed are intended to help in the planning and implementation of future institutes.

1. The Crucial Human Factor

The success or failure of an institute depends to a great extent on the director – his professional competence, his personality, ingenuity, and flexibility.

An institute director should:

a. know the subject

b. be an effective teacher

c. be familiar with the problems and procedures of the American educational system, both at the administrative and classroom levels

d. be dedicated to the improvement of education and the feasibility and desirability of teaching economics in the schools

e. have a genuine respect for the classroom teacher as a professional and as an adult person

f. know how to conduct an educational program based on mutual respect and cooperation between faculty and teacher-participants

The demands that are placed on the director are heavy and require his full-time attention and effort. Every endeavor should be made to free him of other responsibilities, enabling him better to deal with matters of policy, program, and personnel. It was noted that one aspect often underestimated by directors was the realistic allotment of time (and the consequent budget allocations) for planning, consultation, and preparation of reports.

While it is highly desirable that the director participate personally in the instructional program, he should not attempt to bear the primary burden as instructor in the institute. A suggested rough guideline for the director's instructional responsibility is one hour a day, preferably the first session in the morning.

It is important to the participants that channels of communication be maintained with the director, either personally or through an effective liaison, and the director demonstrate his responsiveness to the participants when suggestions or criticisms are made. There is a direct correlation between the morale of the participants and the regard in which they hold the director. This, in turn, reflects to a great extent the director's attitude toward the participants.

The director should have adequate administrative and clerical assistance. It is desirable that he have one full-time administrative assistant with the capability and authority to make all but major policy decisions; and the institute should have a full-time secretary. Additional clerical assistance will be needed from time to time.

It is strongly recommended that institute directors, because of their special qualifications and the heavy responsibilities be compensated more generously than has been the practice in the past. In addition, professional

recognition should be given for the service they perform as representatives and leaders in the fields of economics and education.

In addition to the director and his administrative-clerical staff, there should normally be a minimum instructional staff or three or four full-time people. Ordinarily two of these will be academic economists, and one or two would be professional educationists – a teacher or supervisor from the schools, or professor of education – professionals who are competent in curriculum, methodology, and instructional media.

The type of instruction involved in a teacher institute is peculiarly different from ordinary classroom instruction and requires an instructor with the ability to understand the special needs and problems of professional teachers, who can communicate effectively with them, and command their respect. Institute instructors should be able to demonstrate by their own performance some of the principles and techniques of effective economic education. A PhD degree from an outstanding graduate school and research publications by themselves are not always the best indicators of this type of ability.

Staff members should appreciate the objectives of the institute program. An instructor who is unwilling to devote the necessary time, effort, and energy could endanger the success of the institute. An NDEA Institute should not be entered into merely for the "summer income" it provides.

If at all feasible, a pre-institute staff conference should be held to assure that everyone is familiar with the nature and objectives of the program and understands his own responsibilities. Great care should be taken to avoid unnecessary overlaping and guesswork, especially by part-time staff and guest speakers. They should be informed about what material has already been covered and what still needs to be covered. Institute programs can be seriously weakened by lack of integration and coordination.

Institute participants generally react favorably to more experienced, senior faculty and regard them as appropriate representatives of the sponsoring institution. They are not likely to be satisfied with graduate assistants and sub-professionals, either in economics or education. This is not to say that young professors should not serve on institute faculties; in some cases, younger people are the most enthusiastic, energetic, dedicated, and effective instructors in the institute.

2. Purposes and Objectives

In order to provide the staff with a sharp focus and operational guidelines, and to inform prospective participants, the objectives of the institute program should be clearly defined and expressed. These should be realistically modest for a five or six week program. The design of the program, selection of staff, speakers, and participants should be made with the objectives in mind.

3. Institute Participants

Special care should be taken to select participants similar enough in background and professional interest to assure that a one-track institute

program will meet the needs of all the teachers enrolled. Elementary school teachers with no previous training in economics, for example, normally should not be mixed in the same institute with high school social studies teachers who have completed 12 or 15 hours of college economics and have been teaching a 12th grade economics course or problems of democracy course with eight-week units in economics. Similarly, junior high school history teachers, regardless of their previous training in economics, should not normally be enrolled in an institute with senior high business education teachers.

Participants morale, communication, cohesiveness, professional outlook and activation are all likely to be better when the group is reasonably homogeneous. In addition, the institute will generally be more effective if the participants all live on the campus and work together rather than commuting. There are certain offsetting advantages of a commuter type institute, however, such as the greater ease of bringing the participants together for follow-up programs after the institute is completed. Local conditions and the special objectives of the institute would be important factors in deciding whether to have an on-campus requirement, or whether to permit participants to live off-campus. Prolonged separation from families is always a problem particularly in institutes that last more than five weeks.

Preference should be given to teachers who are in a special position to influence the school curriculum. Proof of teaching ability and leadership potential should perhaps be given more weight in selecting participants than degrees and grades received in college. Experience indicates that there is no strong reason for age or sex to influence the selection of participants. Teachers who have attended NDEA Institutes in economics should not be disqualified from participating in future institutes that cover different materials or similar materials at a more advanced level. Indeed, special effort should be made to encourage such teachers to participate in a second institute in order to deepen their understanding of subject matter and strengthen teaching competence and confidence in economics.

A relevant consideration is the fact that each teacher selected for participation in an NDEA Institute is the object of an investment of $1,000 or more. While there is no simple way to compute cost-benefit ratios, conscientious effort should be made to assure that the investment produces demonstrable results in the schools.

Announcements of future institutes should be widely distributed at the earliest possible date. Ideally, every eligible teacher in the nation should be informed of opportunities for participation in economics institutes. Detailed information concerning eligibility standards, program objectives, and other pertinent details should be published prior to January 1 of the year in which the institute will be held.

4. Physical Facilities and Arrangements

Participant morale and the success of the entire institute can be jeopardized by problems that are purely mechanical and logistical in nature. The finest academic program can be undermined by poor housekeeping.

Great care should be taken to assure that the host institution understands its obligations to the teachers enrolled in the institute. The participants require suitable housing, meals, and recreation facilities at reasonable prices; they need classrooms, workshops, study rooms, books, and instructional equipment. In areas where summer temperatures reach the 80's and 90's, classrooms should be air-conditioned, teachers should be warned to expect discomfort from the heat.

Needless to say, arrangements and prices should be clearly understood and agreed upon in advance. Because teachers enjoy and benefit from informal contacts with guest speakers and institute faculty, arrangements should be made for the participants and staff to have their meals together occasionally or on a regular basis.

5. The Academic Program

The content of the institute program should be appropriate to achieve the stated objectives of the particular institute. The observers feel, in general, that a good rule to follow is to limit what is studied to a block of material that might be regarded as "too modest" and then cover this in depth. Proper balance between "theoretical" and "practical" material is something that teachers look for. The program should include descriptive information, concepts and principles, and statistical analysis. An institute should be more than an offering of traditional summer school courses. It must be logically organized as a unit and carefully integrated and coordinated. Teachers benefit greatly from (and also enjoy) participation sessions in which they have an opportunity to think for themselves, solve problems, and communicate their findings. An institute provides excellent opportunities for laboratory exercises. Generally there should be no more than 20-25 hours per week of lectures or formal presentations.

It should be kept in mind that teachers are professionally-oriented; they want to know how they can use economic information and understanding in their own classrooms. Concrete examples and practical applications are essential. Participants are also likely to regard institute instructors as models of teaching, to be emulated with appropriate adaptations for the school classroom. Institute participants are perceptive and demanding: they will insist on a high-quality program. They bitterly resent being "talked down to." On the other hand, they are frustrated and feel that everyone's time is being wasted when instruction is "over their heads" or irrelevant to their professional interests.

Something can be said for including as a basic objective of the program the development of a better overall understanding of how the U.S. economy functions – even though the institute may deal primarily with one narrow field in the discipline of economics. Rarely will a high school teacher ever have an opportunity to teach beyond the depth of a college "Principles" course in any particular area.

In planning the procedures for teaching the selected content, consideration should be given to using modern techniques, methodology, and media. While the chalkboard continues as a useful classroom aid, there are also available such media as overhead projectors for opaques and transparencies, movies and filmstrips, charts, slides, etc. In this connection, a staff

specialist in educational media can make valuable contributions to the institute program. Teachers generally disapprove of a steady diet of lectures; and they welcome innovations in instructional methodology and media that they can use in their own classrooms. Reading assignments in textbooks and other sources should be clearly identified, coordinated with presentations by the staff and guest speakers, and announced in advance of lectures or discussions dealing with particular topics. Field trips can add a great deal to the program if they are wisely chosen and related to important economic concepts, principles, and facts. Except under unusual circumstances – nearness to a variety of excellent facilities and competent speakers – it is doubtful that the number of field trips should exceed three or four during the institute.

It is of greatest importance that participants in the institute feel they have a voice in the program, that the director and his staff are sensitive to the needs and desires of the group. Whether it is a matter of going too fast or too slow, over-scheduling of staff lectures and guest speakers, neglecting the curriculum aspects, or whatever, the institute should provide some channels of communication for the participants to express their thoughts and judgments on a continuing basis. One possibility is to have the participants select a "Committee on Continuing Evaluation" or "Steering Committee" or "Participants Committee" to meet regularly with the director, or perhaps his administrative assistant, or some other appropriate person, to assure that two-way communication is taking place throughout the institute.

And finally, wherever possible, appropriate university credit at the graduate level should be provided in economics and/or education. Examinations and other course requirements should be clearly explained in advance and special effort should be made to avoid the usual student anxiety associated with tests and grades. Ceremonial behavior with respect to tests and grades should not be permitted to interfere with the educational objectives and values of the institute.

6. Transfer and Translation

By "transfer and translation" we refer to the need to move the economic understanding that the teaching acquires in the institute into the school classroom and "translate" it or adapt it so that the economic concepts, principles, information, and factual data will be understood by high school and elementary school students and will have real meaning for them. This is the real "payoff" for the institutes: how successful will the teachers be in improving the quality of economic education in the schools.

Institutes should pay particular attention to techniques and procedures designed to help the teacher transfer and translate economics in the most effective way. Staff economists and educators might demonstrate, for example, how they could teach a concept or process – such as specialization of labor and increased productivity – in a third-grade classroom; or teach the basic rationale of compensatory fiscal policy to high school juniors. Such demonstrations would not only help increase the economic competence of the participants, but also would increase their confidence. Seeing how it can be done is a way to demonstrate that it can be done.

Identification of study materials and other economic education aids will also help the teacher cope with his transfer and translation problems. Suggested strategies for gaining support and cooperation from school administrators, fellow teachers, and the community at large in efforts to expand and improve economic education programs would also be appreciated by the participants. Provision for follow-up assistance and evaluation should be made wherever possible, perhaps by coordinating the institute – even at the initial planning stage – with the ongoing programs of such organizations as the National Joint Council on Economic Education, its affiliated State and Local Councils, and the growing number of University Centers for Economic Education.

Final Note

The program of NDEA Summer Institutes offers great promise for the field of economic education. In 1966, a total of 175 teachers on five university campuses received the rough equivalent of six semester hours of training in economics. In 1967, teacher enrollment in economics institutes may exceed 1,000. Over a period of just a few years, the national impact on the teaching of economics in the schools can be dramatic!

There is a potential trouble spot, however, in the form of a manpower bottleneck. The number of fully qualified institute directors and staff members may not be adequate to meet the needs of the program unless specific measures are taken in the immediate future. To cope with the problem we offer three suggestions:

1. We urge close cooperation between the Office of Education and the universities and organizations in the field of economic education. These organizations can perform a clearing-house function for identifying qualified personnel and can assist with special training programs to strengthen the qualifications of economists and educators for conducting NDEA Institutes. They can also assist in a variety of other ways: sponsoring the institute coffee hours to promote faculty-participant exchange of information and ideas; helping plan and coordinate follow-up and implementation activities in the participants' respective school systems; providing books and economic education materials for the institute itself and for post-institute programs.

2. Stronger inducements will have to be provided to institute directors, either in the form of appropriate financial compensation (which is presently marginal or inadequate) and/or in the form of the greater professional recognition – perhaps through such organizations as the American Economic Association and appropriate educational associations and the respective universities – for the service they are providing to economics and to education.

3. The Office of Education should establish closer liaison with University administrators to assure that avoidable problems – of personnel and facilities – are indeed avoided, and the universities lend their full support and encouragement to the sponsorship of NDEA Summer Institutes.

APPENDIX

SELECTED RESPONSES FROM THE PARTICIPANTS QUESTIONNAIRES

(This is a representative list of comments made by the participants, not a complete and comprehensive list.)

Table I Knowledge and Skills Imparted

Question: What other kinds of information should have been presented during this Institute?

Selected Responses:

1. More information should have been given on methodology.
2. More on visual aids and more material written for classroom use.
3. A complete review of basic principles, showing how these principles could be utilized in our teaching areas.
4. More opinions on controversial economic material that teachers present to high school students.
5. More on curriculum improvement.
6. Presentations on basic economic problems and issues; additional information on how to incorporate the institute material into high school courses.
7. Demonstrations in teaching techniques and educational media.
8. More demonstrations showing application of content to teaching methodology.
9. More emphasis on history of economic thought and different economic systems.
10. More instruction on how to teach practical issues that might affect us such as how to read the financial page.
11. More ideas for methods of teaching and visual aids.
12. More discussions of current issues and projections into the future – world wide and in the area of economic ideology.
13. Information pertinent to young people entering the economy as job holders.
14. Information on where and how to get new material for teaching economics.
15. More demonstrations on how to teach an economic concept in a high school class room.

16. I would have enjoyed a defense of other viewpoints and approaches such as someone from the University of Chicago.

17. Something on the use and application of computers.

18. A demonstration of how to translate materials for high school use.

19. More material on how the economy is presently working with measurement of success or lack of success.

Table 2 Presentation

Question: What changes would you recommend in presentation for the improvement of future institutes of this type?

Selected Responses:

1. More small group sessions for follow-up discussions.

2. Greater exchange of ideas between speakers and participants.

3. More high-powered guest speakers.

4. A field trip to a large farm or to a labor union headquarters.

5. Better correlation of topics to avoid needless repetition.

6. Less time spent on field trips and more time with economists.

7. Economists with years of experience should play a stronger role than "doctoral candidate" economists.

8. Fewer guest speakers.

9. More small group discussion.

10. No lectures over one hour in length.

11. More seminars and small group presentations.

12. Cut out the field trips.

13. Use of overhead projector.

14. The day following the field trip should be left open for reading and follow-up.

15. More use of visual aids by all speakers.

16. There was too much emphasis on the lecture method.

17. Economic concepts to be looked for on the field trips should have been discussed before the trip.

18. More small seminar meetings.

19. Fewer guest speakers.

20. More practical experiences such as field trips.

21. Have the guest speakers present their text in advance and leave their time open for questioning.

22. For the most part trained teachers should be used rather than guest speakers not professionally prepared to teach.

23. Less overlap by the guest speakers.

24. More time for the institute faculty.

25. There should be more workshops and laboratories and more individualized teaching.

26. More active role for the participants.

27. Instructors who can talk on our level of understanding.

28. I would recommend that guest speakers be more carefully screened and instructed as to the nature of the material they are to present.

29. Bring the staff down and bring the guest speakers up.

30. Have no graduate students on the staff as instructors; no teachers who are not at least Associate Professors.

31. Have more field trips.

32. More guest speakers.

33. Get instructors who are outstanding teachers as well as having outstanding knowledge in their fields.

Table 3. Organization

Question: What changes would you recommend in organization for the improvement of future institutes of this type?

Selected Responses:

1. More group dynamics.

2. A better library.

3. Classroom with adequate chalkboard space.

4. More recreation and social gatherings for the institute participants.

5. A better classroom.

6. Should have fewer commuters; staying on campus would be more productive.

7. Living accommodations were too expensive.

8. Dormitory accommodations could have been greatly improved.

9. Classrooms should be better ventilated.

10. Air-conditioning should be a must.

11. Perhaps a better organized social program.

12. Improved classrooms and instructional equipment.

13. A more complete library in the field of economics.

14. The rooms for small-group discussions should be air-conditioned and clean.

15. Rooms most certainly should be air-conditioned.

17. Institute library should be opened on Saturday and Sunday.

18. Family housing should be provided.

19. More time for independent study.

20. Better facilities for recreation.

21. Reading tests for recommended and required reading should be available before we hear lectures on the subject.

22. Better classroom facilities.

23. Do not insist that participants stay in dormitories; most dorms are too hot in the summer.

24. Provide classrooms with desks or tables to write on without the vision obstructed.

25. Make sure the sponsoring university cooperates in its responsibility for providing facilities and equipment.

26. I suggest classes be held in a regular classroom, one with desks and air-conditioned if possible.

27. Make arrangements for family housing.

28. Have desks so we don't have to write on our laps.

29. Give more outlines of basic materials so we don't have to write notes because then we miss so much of the material in the lectures.

30. Put the institute requirements in writing.

Table 4. General

Instructions: If you have other comments, observations, or recommendations that might contribute to the improvement of future institutes, please write in below.

Selected Responses:

1. Greater effort should be made to select participants at a more homogeneous level of economics training and background.

2. Deal with some specific problems of high school teachers in the teaching of economics.

3. I felt at times that we were being treated like children.

4. More small group discussions should be arranged so an exchange of ideas can take place.

5. Please make sure the universities offer good living accommodations and proper classroom situations.

6. Be sure the quality of staff is high – get outstanding economists.

7. Don't try to cover so much material.

8. I would like to have learned more specific ways to present this material to elementary school pupils and teachers.

9. I would have enjoyed having more films that are centered around the lectures.

10. The staff of the institute were the finest university teachers I have ever encountered, but some of the guest lecturers were of poor calibre.

11. Guest lecturers with personal experience, but little organization and structure should not be used so much. They can be stimulating if used sparingly, but they do lack the substance that a professional teacher needs.

12. Teachers should be allowed to enroll in NDEA Programs on a continuing basis; programs should be planned so as to be built on previous programs.

13. This was one of the few times in my life that I was treated as an adult – the morale of the entire group was extremely high at all times. I would like to highly commend the staff for their attitudes toward us in their conduct of the institute.

14. The institute can serve as a model of organization and cooperation, between participants and faculty.

15. The background of the participants was too varied as far as the amount of previous work in economics is concerned.

16. The first week should be a "leveling" period with intensive presentation of material that we were assumed to know.

17. Because the background of the participants was so varied, I felt that the institute was an up-hill battle for me; there was too much mental anxiety.

18. There should be more high-quality guest speakers.

19. I would have liked a stronger "group" feeling and more informal meetings with the group.

20. Institutes should provide graduate credits in economics and have formal tests and course requirements.

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